Process	***Processing Mass Change***
Process Number	***AM-012***

Description of Process

This process enables users to select a particular set of assets from the database, define the alteration needed, and make changes online or in the background, using scheduled processing.

Warning! Because of its extreme power to change a large number of assets behind the scenes during scheduled processing, it is strongly recommend that only the most experienced users operate the Mass Change function. These users should have both a solid understanding of SQL and an extensive knowledge of the PeopleSoft Asset Management database.

It is also advisable that Mass Changes be created and executed in the test database to ensure appropriate results.

Input to Process

The need to make similar changes to large numbers of assets.

Output of Process

Changes to asset financial or physical information.

Service Level Agreement Required? (if yes, provide a brief description)

PeopleSoft Panel Groups being Used

Function	Panel Group
PeopleTools	Mass Change
Manage Assets	Interface Asset Information

Business Process Description

Process Description		Responsibility (Agency/Centralized)
BACKGROUND: There are three components utilized in the Mass Change process, Mass Change Type, Template, and Definition. Each Template is based on a Type, each Definition is based on a Template. PeopleSoft has delivered many Definitions for your use. Some will require minor modifications. It is rare that users will be required to create new Types and Templates. This process will begin by working backward, beginning with Definition. The user should search for a Definition to use/modify. If an appropriate Definition cannot be found, then search for a Template, then a Type. Whenever an appropriate Type or Template is found, the user will be required to build the remaining pieces. If Mass Change Templates residing on the Mass Change Template table are not available, Mass Change Operator Security may require changes.		
Step 1	**Determining which Mass Change to use.**	Centralized
1.1	**Search for a Mass Change Definition** - From the Manage Assets, Interface Asset Information panel, select Use, AM Mass Change Definition, Description, Update/Display. At the prompt, click OK. A Mass Change Definition ID list will appear. Browse the list for the appropriate Mass Change Definition. Those most commonly used are: • AM ORG Change • AM Location • AM Custodian Change • AM Transfer by Project • Physical Inventory (several definitions) There are many others in addition to the list above. If the desired Mass Change Definition ID is found, skip to Step 6 – Updating mass change definitions.	
1.2	**Search for a Mass Change Template –** From the Go, PeopleTools, Mass Change panel, select Use, Mass Change Template, Description, Update/Display. At the prompt, select PeopleSoft Owner = Asset Management. A list of Templates and their associated Mass Change Types will appear. If the desired Template is found, skip to Step 4 – Adding mass change definitions.	

1.3	**Search for a Mass Change Type –** From the Go, PeopleTools, Mass Change panel, select Use, Mass Change Type, Description, Update/Display. At the prompt, select PeopleSoft Owner = Asset Management and click OK. A list of Types will appear. If the desired Type is found, skip to Step 3 – Defining mass change templates. If the desired Type is not found, skip to Step 2 – Defining mass change types.	
Step 2	**Defining mass change types. This is an OPTIONAL step. Delivered or previously defined mass change types may be used.**	Centralized
2.1	From the PeopleTools Mass Change window select Use, Mass Change Type, Description. At the prompt, enter a Mass Change Type ID.	
2.2	On the Description panel, select the PeopleSoft Owner from the drop down list. Check the Public Use box to share the mass change type with other users and add a detailed description of what the mass change is designed to do.	
2.3	On the Records and Join Fields panel, enter an Execution Sequence and Description for the sequence. Select Record names from the drop down list and SQL Action for the records selected. Click the save icon. Select Join Fields from the drop down list. The Join Fields will not be populated available until the mass change type has been saved.	
2.4	On the Fields and Where panel, enter the Field Name you would like to set up a default for, the SQL Field Action that will be performed on it, and the Value to be defaulted.	
2.5	Add Additional Where Clause to append to the SQL statement(s).	
2.6	On the Free Form SQL panel, enter free form SQL statements for the mass change type. The Free Form SQL box on the Mass Change Records panel must be checked.	
Step 3	**Defining mass change templates. This is an OPTIONAL step. Delivered or previously defined mass change templates may be used.**	Centralized
3.1	From the PeopleTools Mass Change window select Use, Mass Change Template, Description, with an action of Add. At the prompt, enter a Mass Change Template ID and click OK.	

3.2	On the Description panel, select a Mass Change Type ID that the mass change template will be based on. This may be the mass change type ID created in Step 1.1 or an existing ID if a new one was not created. Select the PeopleSoft Owner from the drop down list. The description will default from the Mass Change Type ID and may be edited.	
3.3	On the Criteria and Fields panel, select Criteria Fields Record and Field Name values from the drop down list. Select Default Fields Record and Field Name values from the drop down list. To add additional rows of Criteria or Default Fields, with the cursor in the Record or Field Name field, click the insert row icon.	
3.4	Click the Save icon.	
Step 4	**Adding Mass Change Definitions. This is an OPTIONAL step. Mass change definitions may be reused.**	Centralized
4.1	From the Manage Assets, Interface Asset Information panel, select Use, AM Mass Change Definition, Description, Add. At the prompt, enter a Mass Change Definition and click OK.	
4.2	On the Description panel, select a Mass Change Template from the drop down list. Templates appearing on this list have been specified in the Mass Change Operator Security panel by operator class. Tab out of the Mass Change Template field. A description will default from the template.	
4.3	On the Criteria and Defaults panel, specify the operator and enter fields for which the scope will be based. If you wish to enter multiple rows of criteria, with the cursor in the criteria field, click on the insert row icon. Use the scroll bar to scroll up and down to ensure that all criteria fields are populated. If a criteria field is not needed, place the cursor in the field and use the F8 key to delete the row. If criteria fields are left blank, all possible values for that field will be included in the definition.	

4.4	On the AM Specific Fields panel, enter a Transaction Date and an Accounting Date if different from the default values. The Transaction Date represents the date the change is being made and the Accounting Date represents the date the transaction will be posted to the general ledger. Intfc ID and Open Transaction ID will default to the next available ID. You can change these if you wish, but they must be unused and unique. When reusing a mass change definition, be sure to get the Next Intfc ID by pressing the New button. The Exchange Rate Type is only used when defining a revaluation mass change. Check the Auto Approval Status box if you would like the transactions to load to Asset Management tables without manual review and approval. If Auto Approval Status is not checked, you must approve load lines using the Interface Asset Information, Use, Load Approval panels for INTFC_FIN, INTFC_PHY_A, and INTFC_PHY_B.	
4.5	On the Generate SQL panel, if there is no SQL Statement, click the Generate SQL button. If the Mass Change Definition has been previously used, the SQL Statement must be regenerated. First, click the Clear SQL button and then the Generate SQL button. This is also required whenever you change a table, mass change type, or mass change template. The mass change will not work properly until you regenerate the SQL. **Note: Generating SQL may take several minutes to complete.** If you turn on Execute SQL Upon Saving, the SQL will be executed on save, while you're online. Your operator security determines whether you can execute mass changes online. If you do not check this box, you can save this mass change definition, then execute it in the background, using a run control. When you are satisfied with the SQL text generated, click the save icon. If Execute SQL Upon Saving is checked and operator security allows, the SQL will be executed while you are online. Otherwise, skip to Step 7 – Executing Mass Change.	
Step 5	**Establishing mass change prompt records.**	Centralized
5.1	From the PeopleTools Mass Change panel, select Use, Mass Change Prompt Records with an action of Add. At the prompt, enter the Record and Field for which you would like to set up a prompt table.	
5.2	Select the Prompt Table from the drop down list and click the save icon.	

Step 6	**Updating mass change definitions.**	Centralized
6.1	From the Manage Assets, Interface Asset Information panel, select Use, AM Mass Change Definition, Description, Update/Display. At the prompt, click OK. A Mass Change Definition ID list will appear. Browse the list for the appropriate Mass Change Definition. Those most commonly used are: • AM ORG Change • AM Location • AM Custodian Change • AM Transfer by Project • Physical Inventory (several definitions) There are many others in addition to the list above.	
6.2	No changes are required on the Description panel.	
6.3	On the Criteria and Defaults panel, specify the operator and enter fields for which the scope will be based. If you wish to enter multiple rows of criteria, with the cursor in the criteria field, click on the insert row icon. Use the scroll bar to scroll up and down to ensure that all criteria fields are populated. If either field is left blank, all possible values for that field will be included in the definition.	
6.4	On the AM Specific Fields panel, change the Accounting and Transaction dates. **The Transaction Date is used as the Effective Date when using the AM Location Change or AM Custodian Change definitions.** Click the NEW button to refresh the Intfc and Open Transaction IDs. The Exchange Rate Type is only used when defining a revaluation mass change. Check the Auto Approval Status box if you would like the transactions to load to Asset Management tables without manual review and approval. If Auto Approval Status is not checked, you must approve load lines using the Interface Asset Information, Use, Load Approval panels for INTFC_FIN, INTFC_PHY_A, and INTFC_PHY_B.	

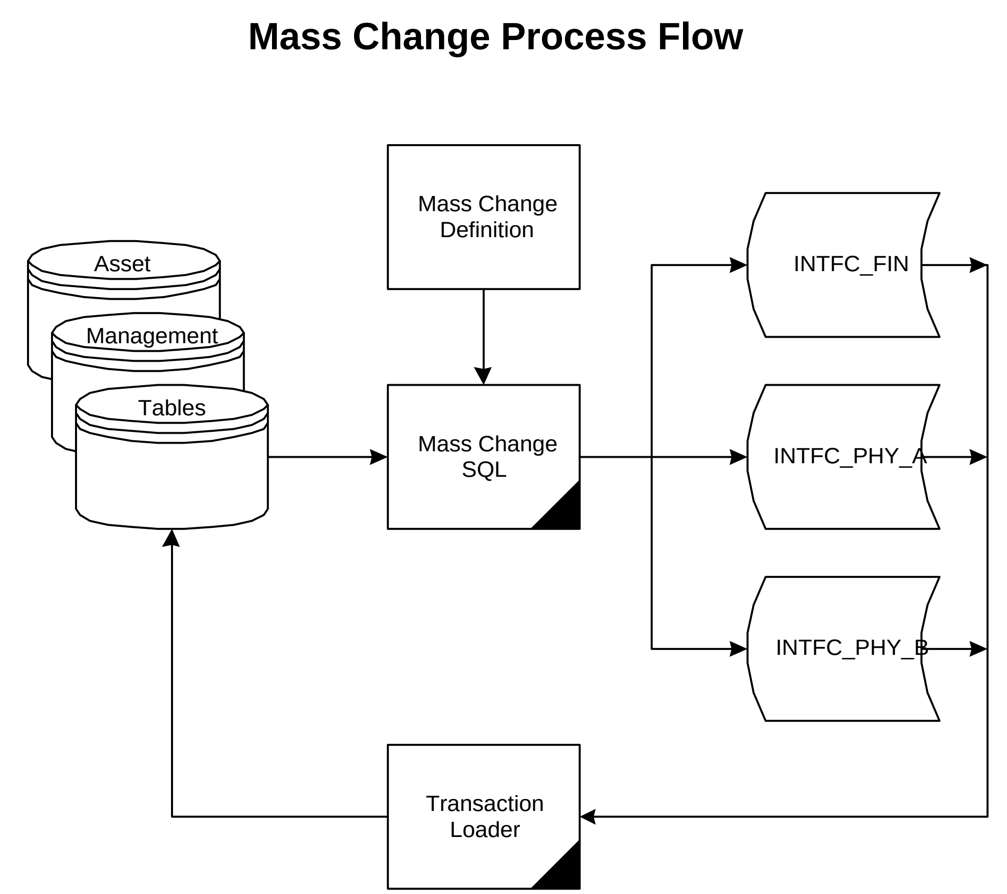
6.5	On the Generate SQL panel, click the Generate SQL button. Whenever you change a table, mass change type, or mass change template, you must regenerate the SQL text for any related mass change definitions. The mass change will not work properly until you regenerate the SQL. If you turn on Execute SQL Upon Saving, the SQL will be executed on save, while you're online. Your operator security determines whether you can execute mass changes online. If you do not check this box, you can save this mass change definition, then execute it in the background, using a run control. When you are satisfied with the SQL text generated, click the save icon. If Execute SQL Upon Saving is checked, the SQL will be executed while you are online. **Note: Generating SQL may take several minutes to complete.**	
Step 7	**Viewing Mass Change Execution History.**	Centralized
7.1	The Mass Change Definition Execution History panel enables you to determine when the last time a mass change definition was run and what the specific input parameters were.	
Step 8	**Creating Mass Change Groups. This is an OPTIONAL step.**	Centralized
8.1	From the PeopleTools Mass Change menu select Use, Mass Change Group. At the prompt, enter the Mass Change Group ID.	
8.2	Select the PeopleSoft Owner from the drop down list.	
8.3	Enter an Execution Sequence and select a Mass Change Definition from the drop down list.	
8.4	Click the Insert Row icon and repeat step 6.3 until all Definitions have been added to the Mass Change Group.	
8.5	Click the save icon.	
Step 9	**Executing mass change.**	Centralized
9.1	From the Interface Asset Information panel, select Process, Mass Change. At the prompt enter a Run Control ID.	
9.2	Select a Mass Change Run Type and provide Execution Parameters.	
9.3	Select the Run or Run With Defaults icon. Provide Process Scheduler Request information, highlight the MASSCHNG SQR Process and click OK.	
Step 10	**Verifying data in the loader tables.**	Centralized

10.1	From the Manage Assets, Interface Asset Information panel, select Use, and one of the following: • Load Preview – Financial to look at INTFC_FIN • Load Preview – Physical A to look at INTFC_PHY_A • Load Preview – Physical B to look at INTFC_PHY_B	
10.2	Review the information in the Interface Financial, Physical A and Physical B loader tables and make changes where needed.	
10.3	Click the save icon.	
Step 11	**Approving changes. This step may not be necessary if the auto approval status box was checked in step 4.4.**	Centralized
11.1	From the Manage Assets, Interface Asset Information panel, select Use, and one of the following: • Load Approval – Financial • Load Approval – Physical A • Load Approval – Physical B The resulting panel displays a summary of all changes pending approval. Approve the pending transactions if appropriate and click the save icon when complete.	
11.2	Repeat step 9.1 for Financial, Physical A, and Physical B.	
Step 12	**Populating PeopleSoft Asset Management tables with asset data.**	Centralized
12.1	From the Manage Assets, Interface Asset Information panel, select Process, Transaction Loader. Enter a Run Control ID at the prompt.	
12.2	Enter the System Source that generated the transactions you want to load, and their Load Type. Turn on Financial Records or Physical Records, depending on the type you want to load. Click Search and Asset Management will bring up all the transactions that fit your specifications. Specify which transactions you would like to load. You can specify transactions by System Source, From Trans Load ID and To Trans Load ID. Click Run or Run with Defaults, the request panel will appear.	
12.3	On the Request panel, select to run on the client and to a file. Click OK.	

Forms Used with Process (#)

**Attach sample form(s)

Process Flow Diagram (if appropriate):



Process Signoff

Tested By
Date Tested